

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.16%) lost 8.36 points and closed at 5,097.33. The blue-chip index DS30 (-0.15%), the Shariah-based index DSES (-0.41%), and the large-cap index CDSET (-0.18%) closed at 1,875.39, 1,143.71, and 1,034.05 points, respectively. Most of the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 1.18% followed by NBFI (-0.82%), Fuel & Power (-0.47%), Telecommunication (-0.34%), Pharmaceutical (-0.09%), Food & Allied (+0.17%), and Bank (+0.67%), respectively. Block trades contributed 5.3% of the overall market turnover. Beach Hatchery Ltd. (+2.1%) was the most traded share with a turnover of BDT 159 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,097.33	5,105.69	-8.36	-0.16%	-2.3%
DS30	1,875.39	1,878.17	-2.77	-0.15%	-3.3%
DSES	1,143.71	1,148.43	-4.72	-0.41%	-2.2%
CDSET	1,034.05	1,035.90	-1.85	-0.18%	-3.0%

	Advanced	Declined	Unchanged	Total
All Category	124	190	82	396
A Category (Equity)	73	108	37	218
B Category (Equity)	24	41	18	83
N Category (Equity)	0	0	1	1
Z Category (Equity)	27	41	26	94
Mutual Funds	12	9	15	36
Corporate Bonds	1	0	2	3
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,705,362	6,711,374	-0.1%
	Mn USD	54,962	55,011	
Turnover	Mn BDT	3,393	3,964	-14.4%
	Mn USD	28	32	
Volume	Mn Shares	136	138	-1.8%
No. of Trade		119,693	139,533	-14.2%

* Average Interbank Exchange Rate is BDT 122.00 as of Apr 17, 2025

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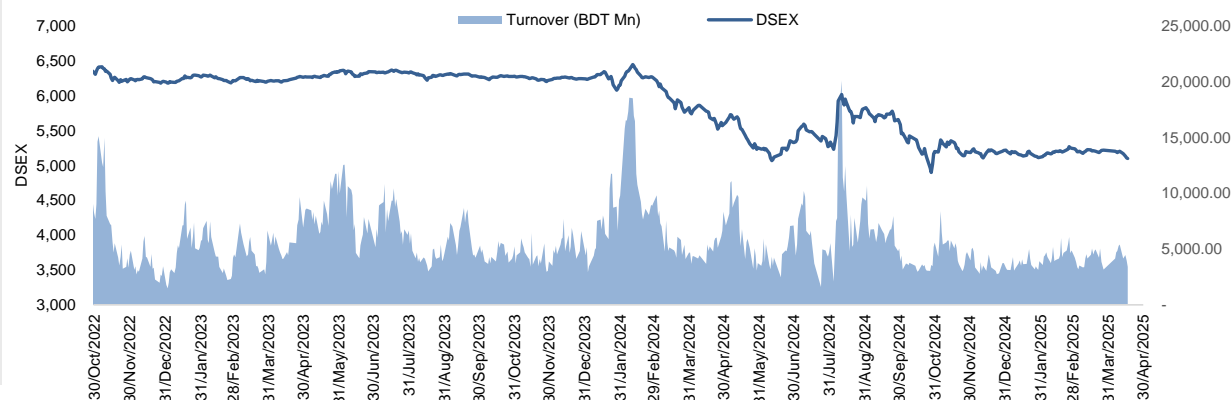


Figure: Sectorial Turnover (BDT Mn)

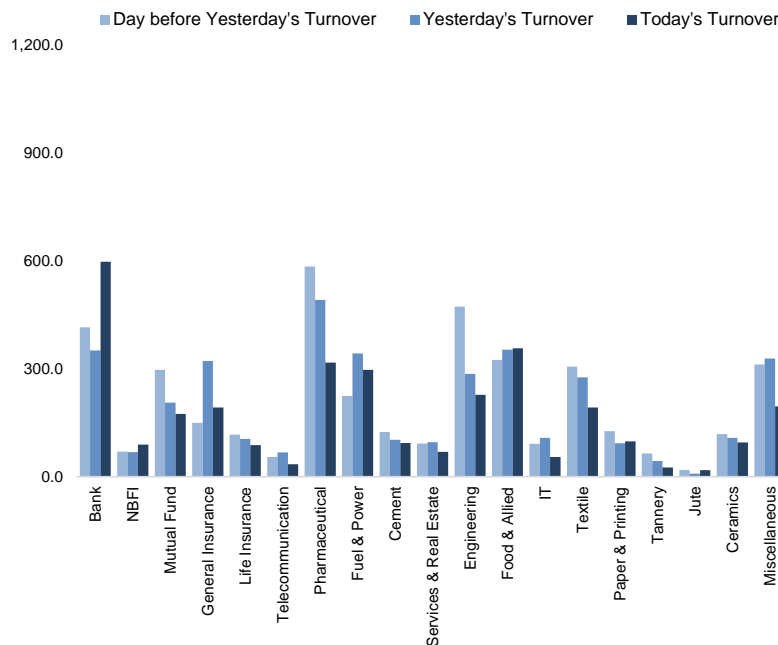
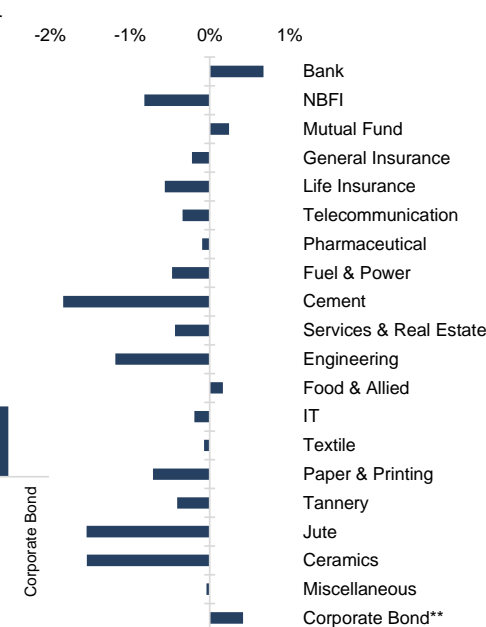


Figure: Sectorial Mcap Change



Market PE 14.4x

Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and NBL

Sector Index	Closing	Opening	Points Δ	%Δ	No. of Companies	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	% of Total Turnover	PE	PB	Top Twenty Market Cap	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	PE	PB
Bank	1,380	1,371	+9.22	+0.67%	36	653,188	9.8%	596.6	18.6%	8.3x	0.7x	GP	431,961	12.4%	15.4	11.9x	6.7x
NBFI	1,039	1,048	-8.57	-0.82%	23	99,055	1.5%	88.9	2.8%	NM	NM	SQURPHARMA	190,853	5.5%	13.2	8.5x	1.5x
Mutual Fund	626	625	+1.51	+0.24%	37	28,781	0.4%	174.1	5.4%	NM	0.6x	BATBC	174,582	5.0%	23.8	10.0x	3.0x
General Insurance	2,581	2,587	-5.74	-0.22%	43	73,680	1.1%	192.2	6.0%	13.1x	1.1x	WALTONHIL	139,135	4.0%	6.9	10.5x	1.3x
Life Insurance	1,726	1,736	-9.74	-0.56%	15	45,906	0.7%	87.9	2.7%	NM	NM	ROBI	134,615	3.9%	17.6	19.2x	2.0x
Telecommunication	5,029	5,046	-17.10	-0.34%	3	589,638	8.9%	34.7	1.1%	13.2x	4.0x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Pharmaceutical	2,913	2,916	-2.77	-0.09%	34	552,304	8.3%	316.9	9.9%	13.1x	1.5x	BRACBANK	87,955	2.5%	11.4	7.9x	1.2x
Fuel & Power	1,095	1,100	-5.18	-0.47%	23	290,058	4.4%	296.6	9.2%	16.2x	0.6x	BERGERPBL	82,752	2.4%	1.2	24.1x	5.7x
Cement	1,825	1,859	-34.10	-1.83%	7	86,969	1.3%	94.0	2.9%	17.2x	1.9x	MARICO	78,737	2.3%	5.6	14.1x	10.4x
Services & Real Estate	986	990	-4.29	-0.43%	9	54,214	0.8%	69.1	2.2%	19.3x	0.4x	UPGDCL	68,404	2.0%	2.7	6.5x	1.8x
Engineering	2,437	2,466	-29.15	-1.18%	42	274,885	4.1%	227.5	7.1%	12.5x	0.9x	RENATA	57,337	1.6%	8.7	19.4x	1.7x
Food & Allied	15,639	15,613	+26.01	+0.17%	21	286,147	4.3%	356.7	11.1%	15.6x	4.3x	LHB	52,262	1.5%	36.1	13.7x	2.8x
IT	1,901	1,905	-3.68	-0.19%	11	25,076	0.4%	55.0	1.7%	19.5x	1.6x	UNILEVERCL	46,461	1.3%	0.2	69.6x	19.0x
Textile	1,048	1,049	-0.73	-0.07%	58	109,149	1.6%	192.2	6.0%	87.0x	0.7x	ICB	43,189	1.2%	7.4	34.1x	1.0x
Paper & Printing	4,358	4,389	-31.13	-0.71%	6	19,688	0.3%	97.9	3.0%	NM	0.9x	BXPHERMA	42,470	1.2%	82.2	6.6x	0.9x
Tannery	1,911	1,919	-7.83	-0.41%	6	21,292	0.3%	25.5	0.8%	NM	1.5x	DUTCHBANGL	41,744	1.2%	2.3	6.7x	0.8x
Jute	11,746	11,930	-183.88	-1.54%	3	2,585	0.0%	18.0	0.6%	NM	NM	EBL	36,806	1.1%	55.7	5.6x	0.9x
Ceramics	408	414	-6.38	-1.54%	5	18,305	0.3%	94.8	3.0%	NM	1.1x	POWERGRID	32,075	0.9%	5.1	NM	0.2x
Miscellaneous	4,214	4,216	-1.65	-0.04%	15	228,859	3.4%	195.3	6.1%	94.2x	1.9x	PUBALIBANK	31,581	0.9%	5.2	3.3x	0.6x
Corporate Bond**	15,508	15,444	+64.60	+0.42%	16	33,966	0.5%	0.6	0.0%	NM	NM	OLYMPIC	31,090	0.9%	11.6	16.9x	2.7x
Treasury Bond**	1,904	1,885	+19.91	+1.06%	236	3,166,034	47.5%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MIDLANDBNK	17.7	+8.6%	120.3	10.2x	1.2x	SQURPHARMA	108,958	7.7%	8.5x	1.5x	BEACHHATCH	96.7	+2.1%	159.3	28.4x	6.4x
UCB	10.7	+8.1%	6.6	4.4x	0.4x	ISLAMIBANK	74,730	5.3%	14.1x	0.9x	UTTARABANK	25.2	-0.4%	154.4	7.7x	0.8x
NRBBANK	13.4	+7.2%	83.3	22.1x	1.0x	BEXIMCO	69,463	4.9%	NM	1.3x	MIDLANDBNK	17.7	+8.6%	120.3	10.2x	1.2x
DGIC	31.6	+6.4%	43.2	39.0x	2.5x	BATBC	50,233	3.6%	10.0x	3.0x	BSC	93.3	-0.4%	118.5	4.9x	1.0x
KPPL	24.2	+5.7%	11.7	NM	NM	WALTONHIL	46,773	3.3%	10.5x	1.3x	NRBBANK	13.4	+7.2%	83.3	22.1x	1.0x
DBH1STMF	4.5	+4.65%	0.2	NM	0.5x	BRACBANK	46,489	3.3%	7.9x	1.2x	BXPHARMA	95.2	+0.2%	82.2	6.6x	0.9x
UNIONINS	29.3	+4.6%	12.6	47.3x	2x	GP	44,708	3.2%	11.9x	6.7x	LOVELLO	80.8	+1.6%	80.1	36.4x	6.4x
SONARGAON	32.9	+4.4%	9.1	NM	1.7x	RENATA	32,968	2.3%	19.4x	1.7x	EASTRNLUB	2,504.3	-0.8%	78.4	71.4x	12.0x
ABB1STMF	5.1	+4.1%	74.4	NM	0.6x	BXPHARMA	23,409	1.7%	6.6x	0.9x	SPCERAMICS	22.4	-6.7%	75.7	NM	0.8x
DELTASPINN	5.4	+3.8%	0.7	NM	0.4x	PUBALIBANK	22,905	1.6%	3.3x	0.6x	ABB1STMF	5.1	+4.1%	74.4	NM	0.6x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	4.3x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
UNIONCAP	4.9	-9.3%	6.1	NM	NM	LHB	20,953	1.5%	13.7x	2.8x	BEACHHATCH	103.0	91.1	22.0	1,250	121.23
HEIDELBCEM	264.2	-8.4%	33.5	40.6x	4x	OLYMPIC	20,496	1.5%	16.9x	2.7x	PREMIERCEM	64.0	55.5	7.0	251	14.60
BDFINANCE	10.0	-7.4%	14.1	NM	0.9x	ALARABANK	18,282	1.3%	15.3x	1.1x	KBPPWBIL	121.7	119.9	6.0	95	11.42
SALAMCRST	22.0	-6.8%	28.2	NM	1.2x	BEACONPHAR	17,838	1.3%	47.7x	4.2x	SONALIANSH	205.8	205.8	1.0	53	10.82
SPCERAMICS	22.4	-6.7%	75.7	NM	0.8x	PRIMEBANK	16,142	1.1%	3.4x	0.6x	ASIATICLAB	36.9	36.9	1.0	100	3.69
RELIANCE1	20.0	-6.1%	31.1	NM	1.9x	ROBI	14,876	1.1%	19.2x	2.0x	PRAGATILIF	109.9	108.0	2.0	22	2.43
RANFOUNDRY	145.6	-5.8%	5.2	6.7x	4.4x	UTTARABANK	13,699	1.0%	7.7x	0.8x	BANKASIA	18.4	18.4	1.0	100	1.84
STANCERAM	67.3	-5.3%	0.1	NM	NM	NBL	13,055	0.9%	NM	2.1x	LOVELLO	80.0	78.5	2.0	23	1.78
ACI	194.6	-4.6%	38.6	NM	2.8x	BSRMLTD	12,852	0.9%	5.0x	0.5x	SINOBANGLA	48.9	48.9	1.0	34	1.66
MAGURAPLEX	76.4	-4.3%	20.0	22.9x	1.0x						RELIANCE1	21.4	21.4	2.0	66	1.41
<div>* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.</div> <div>** The base of the Bond Index starts at 100, starting from Jan 13, 2022</div> <div>Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022</div>																

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Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
BEACHHATCH	103.0	91.1	121.2	1,250	22
PREMIERCEM	64.0	55.5	14.6	251	7
KBPPWBIL	121.7	119.9	11.4	95	6
SONALIANS	205.8	205.8	10.8	53	1
ASIATICLAB	36.9	36.9	3.7	100	1
PRAGATILIF	109.9	108.0	2.4	22	2
BANKASIA	18.4	18.4	1.8	100	1
LOVELLO	80.0	78.5	1.8	23	2
SINOBANGLA	48.9	48.9	1.7	34	1
RELIANCE1	21.4	21.4	1.4	66	2
INTRACO	23.9	23.9	1.0	40	1
ABBANK	7.3	7.3	0.8	113	1
BXPHERMA	104.5	104.5	0.8	7	1
SHEPHERD	15.7	15.7	0.8	49	1
MAGURAPLEX	82.4	82.4	0.7	8	1
AIL	47.0	47.0	0.7	14	1
UNIONINS	27.4	27.4	0.6	23	1
HEIDELBCEM	285.0	285.0	0.6	2	1
AGNISYSL	29.5	29.5	0.5	17	1
BSC	94.5	94.5	0.5	5	1
REPUBLIC	30.5	30.5	0.5	16	1
Total			178.3		56

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
UTTARABANK		17.5%	17.5%	Record Date	20-Apr-25
PARAMOUNT		0.0%	10.0%	Record Date	22-Apr-25
EBL		17.5%	17.5%	Record Date	23-Apr-25
RECKITBEN		0.0%	3330.0%	Record Date	29-Apr-25
PRIMEFIN		0.0%	0.0%	Record Date	6-May-25
IPDC		5.0%	5.0%	Record Date	8-May-25
EASTLAND		0.0%	10.0%	Record Date	2-Jun-25

Important DSE News
IPDC

The Board of Directors has recommended 5% Cash Dividend and 5% Stock Dividend, subject to the approval of regulatory authority and shareholders in the upcoming AGM, for the year ended December 31, 2024. Date of AGM: 02.06.2025, Time: 09:30 AM, Venue: Virtually by using digital platform, Record Date: 08.05.2025. The Company has also reported EPS of Tk. 0.93, NAV per share of Tk. 17.73 (with revaluation), NAV per share of Tk. 16.99 (without revaluation), and NOCFPS of Tk. (6.40) for the year ended December 31, 2024 as against Tk. 0.88 (adjusted), Tk. 17.33 (adjusted) (with revaluation), Tk. 16.58 (adjusted) (without revaluation), and Tk. 0.57 (adjusted) respectively for the year ended December 31, 2023.

INTRACO

The company has informed that the Hon'ble High Court Division of the Supreme Court of Bangladesh has sanctioned the Scheme of Amalgamation for the merger of M.Hye & Co. CNG Refueling Station Limited (Transferor Company), Nessa & Sons Limited (Transferor Company), and Good CNG Re-fueling Station Limited (Transferor Company) with Intraco Refueling Station PLC (the Transferee Company), as approved in the Extraordinary General Meeting (EGM), subject to compliance with the orders and directions provided in the certified copy of the final judgment and order dated October 16, 2024 passed in the Company Matter No. 462 of 2023, an application under Section 228 read with Section 229 of the Companies Act, 1994. The matter was heard by the Hon'ble Court on February 11, 2024, and the certified copy of the final judgment and order sanctioning the Scheme of Amalgamation was received by the Company on 27.03.2025.

ACI

Dr. Arif Dowla, Managing Director of the company, has expressed his intention to buy 1,400,000 shares of the company at prevailing market price (in the Block Market) through Dhaka Stock Exchange PLC. within April 30, 2025 as per Rule-4 of the BSEC (Ullekzhogyo Sonkhyok Share Orjon, Odhigrohon o Kortritto Grohon) Bidhimala, 2018.

EMERALDOIL

The company has informed that the Board of Directors has appointed Mr. Mohammad Zaman, ACS, LL.M as the Acting Company Secretary of the company.

ZEALBANGLA

The company has informed that Mr. Mohammad Moksad Mia has been appointed as the Company Secretary of the company.

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